Introduction to Legacy HawkSoft Help Documentation

Version 5 of the HawkSoft Management System has reached its end of support. The following documents are an offline copy of the legacy Version 5 online help portal, provided as a courtesy to your agency, which has elected to remain on HawkSoft version 5.

Please keep the following in mind as you navigate this help documentation:

- To prevent issues with size, portability, and navigability, the Version 5 help documentation has been split into nine PDF files (including this one). If a help topic contains a link to a different topic which does not seem to function properly, it most likely links to a topic contained in a different PDF file. In that case, try searching the other PDF files for the topic named in the link.
- While some topics may mention contacting Product Support for assistance, **please note that HawkSoft Product Support assistance of any kind is no longer available for this version of HawkSoft**.
- While we have done our best to remove any topics relating to online features that are no longer functional, this help documentation may still contain references to features which are no longer functional due to HawkSoft 5's end of support.
- Help and training videos are not available in this help documentation. However, you may still occasionally see references to help or training videos in this documentation.

Business Agency Reports Overview

The HawkSoft enables you to run customized reports as well as pre-defined reports to track and analyze your agency's business.

1230 SE 3rd Ave.

Agency Intelligence

Agency Intelligence provides access to several predefined reports which track Key Performance Indicators (KPIs). These KPIs are based on your agency's "book of business" (customer and policy data that currently exists in CMS). The data is displayed in a table, as well as in pie and bar charts where applicable, making it easy for you to measure and evaluate your agency's overall performance.

Agency Intelligence Reports

Sales & Retention

Sales and Retention provides access to several predefined reports which include sales pipeline and renewal data. These metrics are based on your agency's customer and policy data that currently exists in CMS. The data is displayed in a table, as well as in pie and bar charts where applicable, making it easy for you to evaluate your agency's sales performance and take action on upcoming renewals.

Sales and Retention Reports

Sales Pipeline Reports

Each of the Sales Pipeline reports within Sales & Retention includes metrics to enable the agency owner/manager to make data driven decisions about how the sales team is performing and closing on sales. These reports help identify where the issues are in the sales funnel for your agency.

Sales Pipeline Reports

Advanced Customized Reports

Create a new customized report using the Report Generator filters, layout options, and summarize options. CMS enables you to save your report filters and layout as a "Memorized" report or save your report results for reviewing at a later date.

Advanced Customized Reports

Common Advanced Reports

This topic includes a list of commonly used reports. Follow the provided instructions to create the reports, and then you can use filters, layout options, and summarize to meet your agency's needs.

Many of these reports might already be available in your Memorized Reports.

Custom Reports: Step by Step

Report Templates (Memorized Reports)

Memorized reports store all the filter and layout selections of a report so future reports can be generated using the same filter and layout options. Memorized report settings (filter and layouts) can be modified for greater flexibility.

Report Templates (Memorized)

Saved Reports

CMS enables you to save the results of an Advanced Report to conveniently view data at a future date. These reports are available from the Report Generator dialog.

Saved Reports

Working with Report Data

Once a report is run in CMS, you can modify the view and sort, summarize, and filter the data to include or exclude specific information.

Working with Report Data

Suspense Report

HawkSoft CMS enables you to open a Suspense List as a report, based on selected filters. This method provides a little more flexibility and control than opening your Suspense List from the Start Page. You can filter the list to include Suspenses with a past, current, or future due date, and review Suspenses for all users or a specific user.

Suspense reports are commonly used to confirm that all users are current on their open Suspenses.

Suspense Report

Activity Report

The HawkSoft CMS Activity Report enables you to monitor the activities of users in CMS as well as data coming in from carrier downloads and vendors. The Activity Report displays user log entries, download logs, and the items processed through the Unmatched Documents.

Activity Reports

Download Report

The CMS Download Report includes important information about each of your processed downloads. This report enables you to review your processed downloads to confirm that they have been received from all carriers that you are expecting transactions from, and to verify that downloads are matched and processed as needed.

Download Report

Agency Intelligence Reports

Agency Intelligence provides access to several predefined reports which track Key Performance Indicators (KPIs). These KPIs are based on your agency's "book of business" (customer and policy data that currently exists in CMS). The data is displayed in a table, as well as in pie and bar charts where applicable, making it easy for you to measure and evaluate your agency's overall performance.

This task is typically performed by an Owner/Administrator or Manager.

In this topic:

Reports Toolbar	Available Reports
How to View Data	How to Work with Report Data

See Best Workflow Practices for Accurate Reporting to ensure that your agency enters data correctly in CMS.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Reports > Advanced Reports > Agency Intelligence

See Setting User Permissions for more information.

To access Agency Intelligence, click **Reports** > **Agency Intelligence** from the main CMS menu bar.

Reports Toolbar

Agency Intelligence	Click to access predefined Agency Intelligence Reports.
Sales & Retention	Click to access predefined Sales and Retention Reports.
Advanced	Click to create a new customized report using the Report Generator. See Advanced Customized Reports for more information.
Open	Opens the Agency Documents folder where your memorized and saved reports are located. Select a report and click **Open**. See Report Templates (Memorized) and Saved Reports for more information.
Save	Save the report to your Haw/Agency Documents folder. This option is available for Advanced Reports or once you drill-down in an Agency Intelligence or Sales & Retention report.
Print	Click to send the report to the selected printer. You must have permissions to **Reports: Allow Printing** for this option to be enabled. See Setting User Permissions.
Refresh	For Agency Intelligence and Sales & Retention

	reports, this button refreshes the data to reflect any recent changes in your agency's database since the report was opened.
Summary	Opens the **Create Summary** dialog to enable you to filter data further. This option is available for Advanced reports, or once you drill-down in an Agency Intelligence or Sales & Retention report.
Filters	Opens the Policy Type Filter dialog to enable you to rerun the report. This option is available for Advanced reports.
Layout	This button opens a dialog that enables you to add or remove columns displayed in your current report. Once changes are made to the columns, all existing data will update with the most current client/policy information. This option is available for Advanced reports, or once you drill-down in an Agency Intelligence or Sales & Retention report.
Tutorial	Click to open a brief reports tutorial.

Available reports

A list of available reports appears in the left side pane, and is organized by the following categories:

Customer KPIs

These performance indicators help you evaluate your agency's book of business for your active customers and analyze each metric by client level performers (CSR, Producer, and Client Office).

Description of predefined reports

Customer KPI Reports	Description
Customers	Total number of customers with one or more Policies in force. **Policies per Customer** – The average number of policies in force for each of these customers. Learn more **Premium per Customer** – The average current premium per customer. Learn more **Customers Added (12 Months)** – New customers added within a selected date range. Date range defaults to the last 12 months. Learn more **Customers Lost (12 Months)** – Customers whose last policy or policies canceled or expired within a selected date range. Date range defaults to the last 12 months. Learn more A customer could be on both the Added and Lost report if they started a

Customer KPI Reports	Description
	new policy within the last 12 months, and that policy canceled within the last 12 months. **Net Change (12 Months)** – Total change in customer count for measuring performance. Learn more
Customer Lifetime	Based on a formula commonly used in the insurance and marketing industry. This report enables you to report on the projected average length of time customers will be with your agency and enables you to better determine where your agency might need to improve on customer retention. Learn more **Formula**: The report projects expected customer lifetime in years based on the agency's existing retention rate by using the formula 1/(1-retention rate). For more information about the Customer Lifetime formula, see the fol-

Customer KPI Reports	Description
	lowing articles: A Comprehensive Guide to Customer Lifetime Value The Marketing Study Guide
Customer Retention	The percentage % of customers that have been retained since they were added 12 months ago. Learn more
No Active Auto	Percentage of customers with one or more Personal lines policies in force that don't have an active Auto policy. Learn more
No Active Home	Percentage of customers with one or more Personal lines policies in force that don't have an active Home policy. Learn more
No Active Personal Umbrella	Percentage of customers with a personal Auto and Home policy in force that don't have an active Personal Umbrella policy. Learn more

Policy KPIs

These Key Performance Indicators help you evaluate agency performance at the policy level, for example to determine carriers that generate the highest number of policies and highest premium.

Description of predefined reports

Policy KPI Reports	Description of report data
Policies in Force	Total number of policies that are currently active. Learn more
Premium	Active annualized premium of policies in force. This is the sum of the Current Rate field on the policies. Learn more For policies with Annualize Premium unchecked, the current term premium will be used as the annualized premium.
Premium per Policy	Average annualized premium per active policies. Learn more For policies with Annualize Premium unchecked, the current term premium will be used as the annualized premium.
Policies Sold (12 Months)	New policies with a Sold Date within the past 12 months. Learn more
Policies	New policies added that have an

Policy KPI Reports	Description of report data
Added (12 months)	Inception Date within the past 12 months. Excludes policies with a status of Rewrite. Learn more
Policies Lost (12 months)	Policies that have an inactive status within a selected date range (excluding policies with a status of Replaced). Date range defaults to the last 12 months. Learn more
Net Change	Net change between policies added and policies lost within a selected date range. Date range defaults to the last 12 months. Learn more

How to view data

Select any of the reports from the left-hand pane to see the metrics displayed in a table as well as a bar chart, pie chart, or graph.

Filters

Depending on the report selected, different filter options are available at the top of the metrics table to enable you to change the way the data is presented.

Group By – Group the data by a performance category.

Date Range – You can change the date range to only include data within a specific time period.

by – Once you have selected a date range, you can select a time interval, or select None to view all the data without sorting.

Compare – You can compare data by policy or premium.

> The Table Filters button is available for advanced users. Click to open the **Filter Editor** dialog to limit the data displayed on the screen.

Drill down

Double-click a specific cell in the table to break down the metrics in a detailed report. Your cursor arrow becomes a hand when you hover over a clickable cell.

How to work with report data

Once you have drilled down to view report details, you can use the toolbar and right-click menu options to work with the data. See Working with Report Data for more information.

Related Topics

Advanced Customized Reports
Best Workflow Practices for Accurate Reporting
Custom Reports: Step by Step
Sales and Retention Reports
Report Templates (Memorized)
Working with Report Data
Saved Reports

Sales and Retention Reports

Sales and Retention provides access to several predefined reports which include sales pipeline and renewal data. These metrics are based on your agency's customer and policy data that currently exists in CMS. The data is displayed in a table, as well as in pie and bar charts where applicable, making it easy for you to evaluate your agency's sales performance and take action on upcoming renewals.

This task is typically performed by an Owner/Administrator or Manager.

In this topic:

See Best Workflow Practices and Cleaning up Agency Data to ensure that your agency enters data correctly in CMS.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Reports > Advanced Reports > Sales & Retention

See Setting User Permissions for more information.

To access Sales and Retention Reports, , click **Reports** > **Sales & Retention** from the main CMS menu bar.

Reports Toolbar

Agency Intelligence	Click to access predefined Agency Intelligence Reports.
Sales & Retention	Click to access predefined Sales and Reten-

	tion Reports.
Advanced	Click to create a new customized report using the Report Generator. See Advanced Customized Reports for more information.
Open	Opens the Agency Documents folder where your memorized and saved reports are located. Select a report and click **Open**. See Report Templates (Memorized) and Saved Reports for more information.
Save	Save the report to your Haw/Agency Documents folder. This option is available for Advanced Reports or once you drill-down in an Agency Intelligence or Sales & Retention report.
Print	Click to send the report to the selected printer. You must have permissions to **Reports: Allow Printing** for this option to be enabled. See Setting User Permissions.
Refresh	For Agency Intelligence and Sales & Retention reports, this button refreshes the data to reflect any recent changes in your agency's database since the report was opened.
Summary	Opens the **Create Summary** dialog to enable you to filter data further. This option is available for Advanced reports, or once you drill-down in an Agency Intelligence or Sales & Retention report.
Filters	Opens the Policy Type Filter dialog to enable you to rerun the report. This option is available for Advanced reports.

Layout	This button opens a dialog that enables you to add or remove columns displayed in your current report. Once changes are made to the columns, all existing data will update with the most current client/policy information. This option is available for Advanced reports, or once you drill-down in an Agency Intelligence or Sales & Retention report.
Tutorial	Click to open a brief reports tutorial.

Sales Pipeline reports

Each of the Sales Pipeline reports within Sales & Retention includes metrics to enable the agency owner/manager to make data driven decisions about how the sales team is performing and closing on sales. These reports help identify where the issues are in the sales funnel for your agency.

Each Sales Pipeline report is based on a Sales Pipeline status and can be further filtered by a sub-status.

> You can create customized sub-statuses for your agency. These sub-statuses will be available from the Action menu and will be available as Sales Pipeline reports.
>
> See Sales Pipeline Configuration to customize your Sales Pipeline sub-statuses in CMS.

See Policy Status for a detailed explanation of the status workflow in CMS.

Description of predefined reports

The following table describes the Sales Pipeline reports and default sub-status reports. The sub-status reports are determined by your agency's customized sub-statuses.

A **(No Sub-Status)** report includes policies that do not have a selected sub-status. If your agency has Sub-Statuses set as a Required selection, this report is not included.

An **Other** report includes policies with a sub-status that doesn't match any sub-statuses set up in your Customized List.

Sales Pipeline	Description
Lead	Policies with a Lead status indicates possible interest. You can select one of the following sub-status reports to view a pie chart specific to that sub-status: **Unqualified** **Qualified**
Prospect	Potential new customers who have expressed interest in your product or service. You can select a sub-status report to view a pie chart specific to that sub-status: **Discovery** **Submission** **Quote** **Proposal**
Refused	Policy quote/proposal not accepted by the customer. You can select a sub-status report to view a pie chart specific to that sub-status: **Price** **Didn't Buy Risk**
Rejected	The policy has been disqualified.

Sales Pipeline	Description
	U/W Rejected **Agency Disqualified**

Sample reports

Prospect Report

Refused Sales Pipeline Reports

Rejected Sales Pipeline Reports

Renewal reports

Each of these reports includes metrics which provide your agency with relevant information for the purpose of taking action on renewals coming up in a selected date range.

Description of predefined reports

Renewals next 60 days	Description of report data
Commercial Renewals	Commercial policies with an upcoming Effective Date from a pending renewal or upcoming Expiration Date.
Personal Lines Renewals	Personal policies with an upcoming Effective Date from a pending renewal or upcoming Expiration Date. **No Active Auto** – Customers, with a Personal policy renewal, who do not have an active Auto policy.

Renewals next 60 days	Description of report data
	No Active Home – Customers, with a Personal policy renewal, who do not have an active Home policy. **No Active Personal Umbrella** – Customers, with a Personal policy renewal, who have an Auto and Home policy, but do not have an active Personal Umbrella policy.

Filtering the data

Depending on the report selected, different filter options are available at the top of the metrics table to enable you to change the way the data is presented.

Group By – Group the data by a performance category.

Date Range – You can change the date range to only include data within a specific time period, and then select a time interval to view all the data without sorting.

Compare – You can compare data by policy or premium.

The Table Filters button is available for advanced users. Click to open the **Filter Editor** dialog to limit the data displayed on the screen.

How to review and work with report data

Double-click a specific cell in the table to break down the metrics in a detailed report. Your cursor arrow becomes a hand when you hover over a clickable cell.

Once you have drilled down to view report details, you can use the toolbar and right-click menu options to work with the data. See Working with Report Data for more information.

Related Topics

Agency Intelligence Reports
Batch Mailing (Print)
Best Workflow Practices
Cleaning up Agency Data
Custom Reports: Step by Step
Report Templates (Memorized)
Saved Reports
Working with Report Data

Sales Pipeline Reports

Each of the Sales Pipeline reports within Sales & Retention includes metrics to enable the agency owner/manager to make data driven decisions about how the sales team is performing and closing on sales. These reports help identify where the issues are in the sales funnel for your agency.

Each Sales Pipeline report is based on a Sales Pipeline status and can be further filtered by a sub-status.

> You can create customized sub-statuses for your agency. These sub-statuses will be available from the Action menu and will be available as Sales Pipeline reports.
>
> See Sales Pipeline Configuration to customize your Sales Pipeline sub-statuses in CMS.

See Policy Status for a detailed explanation of the status workflow in CMS.

In this topic:

Access the Sales Pipeline Reports	Description of Predefined Reports
Sample Reports	How to Review and Work with Report Data

Required Permissions:
In order to complete this task, user permissions must be set to include:

Reports > Advanced Reports > Sales & Retention

See Setting User Permissions for more information.

To access the Sales Pipeline reports

Click **Reports** > **Sales & Retention** from the main CMS menu bar.

The Sales Pipeline reports are available in the left-hand pane.

Description of predefined reports

The following table describes the Sales Pipeline reports and default sub-status reports. The sub-status reports are determined by your agency's customized sub-statuses.

A **(No Sub-Status)** report includes policies that do not have a selected sub-status. If your agency has Sub-Statuses set as a Required selection, this report is not included.

An **Other** report includes policies with a sub-status that doesn't match any sub-statuses set up in your Customized List.

Sales Pipeline	Description
Lead	Policies with a Lead status indicates possible interest. You can select one of the following sub-status reports to view a pie chart specific to that sub-status: **Unqualified** **Qualified**
Prospect	Potential new customers who have expressed interest in your product or service. You can select a sub-status report to view a pie chart specific to that sub-status: **Discovery** **Submission** **Quote**

Sales Pipeline	Description
	Proposal
Refused	Policy quote/proposal not accepted by the customer. You can select a sub-status report to view a pie chart specific to that sub-status: **Price** **Didn't Buy Risk**
Rejected	The policy has been disqualified. **U/W Rejected** **AgencyDisqualified**

Sample reports

Prospect Report

Refused Prospect Report

Rejected Sales Pipeline Reports

How to review and work with report data

Double-click a specific cell in the table to break down the metrics in a detailed report. Your cursor arrow becomes a hand when you hover over a clickable cell.

Once you have drilled down to view report details, you can use the toolbar and right-click menu options to work with the data. See Working with Report Data for more information.

Related Topics

Agency Intelligence Reports
Batch Mailing (Print)
Best Workflow Practices for Accurate Reporting
Custom Reports: Step by Step
Report Templates (Memorized)
Saved Reports
Working with Report Data

Advanced Customized Reports

The HawkSoft CMS Advanced Reports enables you to run customized reports that include any combination of client, policy, claims, and marketing information from data stored in CMS client files.

Using the CMS Report Generator, you can:

- Create and store customized reports
- Filter and summarize the data
- Use generated reports as the basis for batch emails and form letters

Before running an Advanced Report, see if the report you need is available from the Agency Intelligence Reports or Sales and Retention Reports tabs. These tabs have the most common reports ready for you to view.

Required Permissions:
Reports are typically created by an Owner/Administrator or Manager, however, CMS provides the ability to allow limited access to any user whose job responsibilities include this task.
Example: An agency owner may allow access to Advanced Reports but can limit a user's ability to print, export, and/or save report data.

See Setting User Permissions for more information.

In order to complete this task, user permissions must be set to include:

Reports > Advanced Reports > Create New Reports > Run Memorized Reports

The **Output of Advanced Reports** User List permission contains a secondary permission related to the ability to print, export, and/or save report data.

Running a new report

1. Click **Reports** > **Advanced Reports** from the main CMS menu bar.
2. Click **<New Report>**.

The **Policy Type Filter** dialog opens.

3. Select the **Policy Types** to include in the report.

   OR

   Click **Does NOT have Active Policy**, to determine the client files to include in the report based on types of policies not currently active.

   Select one or more policy types from the Does NOT have Active Policy list.

   Selecting this option refreshes the screen to display the **Has Policy** checklist on the left.

   > **Has Policy** – Filters the report to include clients that have an active policy of the type selected.

   > When narrowing your search to include client files that have specific policy types, this option makes it easier to cross-sell to your clients by filtering for customers that have one type of policy but do not have another particular type of policy.

4. **Report By** – Select one of the following to determine information to be included in each line item on the report.

   - **Policy** – Select to display report results by policy. If more than one policy in a client file matches the report criteria, the report displays each matching policy as a separate line item on the report.
   - **Client (At least one policy must match criteria)** – Displays report results by client when at least one policy matches the report criteria. If multiple policies match the selected criteria, only the first matching policy will be displayed.

     This option is commonly selected when using reports in conjunction with Batch Mailing or Batch Emailing.
   - **Client (All policies must match criteria)** – Displays report results by client when all policies in the client file match your report criteria.

- **Personal Profiles** – Displays report results by personal profile data that matches report criteria.
- **Cross-Sell/XDates** – Displays results by XDate data.
- **Claims** – Displays results by Claims data.
- **Client Tags** - Displays report results by all tags applied to all client files. See Client Tags [+video] for more information.

5. Click **Next**.

   The **Report Generator Filters** dialog opens.

   Report Generator filters enable you to select up to six filters to limit data included in the report.

> - While you can apply up to six Report Generator filters to narrow your search, keep in mind that only clients or policies meeting *all* of the filter criteria will appear on the report. Try to set only a few filters and then Summarize to sort the results.
> - Filter options with an * asterisk are indexed data and will return quicker results. When filter options with an * asterisk are selected as well as options without an asterisk, results will not be faster.
>
> Be sure **Reports Use Index** is selected in General Configuration Settings to search using the index.

6. Optional: Choose a **Filter** from the drop-down list, and then select the filter criteria.

> For easier navigation, filters are grouped by categories.

   Add additional filters, as needed.

   Example: When running a Production report, you may want to narrow your report to a particular date range. Choosing the Inception Date filter, and then indicating a date range, enables you to view production for that particular time frame.

7. Optional: Use the **Not** check box to create filter exceptions.

   Example: You may want to report on all policies inserted into CMS with a status other than Lead, Prospect, Refused, or Rejected.

   a. Select **Status*** from the **Filter** drop-down list.
   b. Check the **Not** box.
   c. Check the **All Sales Pipeline** box from the criteria list on the right side of the dialog.

8. Click **Next**.

9. Optional: Select a different **Report Layout** from the drop-down list, as needed.

   The default layout is determined by the selection made in the **Report By** section of the Policy Type Filters dialog.

   > Selecting a layout that does not correspond to your **Report By** selection will impact which fields are displayed for each line item.

   The fields associated with the selected Report Layout are listed in the **Report Fields** box.

10. Optional: You can drag the fields to arrange them in the order that you want them to appear on the report.

11. Optional: Click **Add/Edit** to modify the list of output fields for your report.

    The **Add Report Field** dialog opens.

    Check or un-check the fields to include or exclude them, and then click **OK**.

    > The field selections will not be automatically saved to this report layout. To save your field selections to a report layout, you must save the layout with a new layout name.

12. Optional: Save the report layout.

    This doesn't save the report filters, only the field layout.

    a. Click **Save Layout** to save the list of Report Fields as a new Report Layout.
    b. Enter a **Layout Name**, and then click **OK**.

13. Optional: Enter a **Report Title** if you plan to save the report results.

14. Click **Finish**.

    The CMS Report Generator displays the results. Click the **Filters** button to re-run the report using different criteria. To modify the report view and the content, see Working with Report Data.

Related Topics

Agency Intelligence Reports
Batch Emails
Batch Mailing (Print)
Custom Reports: Step by Step
Data Replace Using the Report Generator
Report Templates (Memorized)
Saved Reports
Sales and Retention Reports
Working with Report Data

Custom Reports: Step by Step

This topic includes a list of commonly used reports. Follow the provided instructions to create the reports, and then you can use filters, layout options, and summarize to meet your agency's needs.

- These reports might be available in your Memorized Reports list.

  See Saved Reports and Report Templates (Memorized) to learn how to save this report for future use.

- Many of these reports are also available as predefined reports in Agency Intelligence and Sales and Retention.

This task is typically performed by an Owner/Administrator or Manager.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Reports > Advanced Reports > Create New Reports > Run Memorized Reports

See Setting User Permissions for more information.

The following examples are reports typically run by agencies. The most commonly used date range is provided in each example, but you can change the date selection to meet your agency's needs.

Active Clients Report

Activity Reports

Report on Annualized Premium

Birthday Report

Book of Business

Cancel Pending Report

Cancelled Policies Report

Claims Report

Client Since Date Report

Cross Sell Report

Data Replace Using Advanced Reports

Policies by Company Report (Book of Business)

Policy Data Auditing

Production Report (Inception Date)

Renewal 30 Day Email Notification

Renewal Report (Expiration Report)

Renewal Report: Sales and Retention

Suspense Report

XDate Report

Related Topics

Agency Intelligence Reports
Business Agency Reports Overview
Advanced Customized Reports

Report Templates (Memorized)

HawkSoft CMS enables you to save Advanced Report filters and layout selections as "memorized reports", so that frequently needed reports can be generated quickly. Memorized report settings (filters and layouts) can then be modified as needed.

Commonly used memorized reports, as well as the memorized reports created by your agency, are available in the Memorized Reports list when you select **Reports** > **Advanced Reports** from the main CMS Menu bar. These reports already have Filters and the Report Layout preselected.

CMS also enables you to save the results of a report so you can review historical data at a future date. See Saved Reports for more information.

In this topic:

Check out predefined Agency Intelligence and Sales and Retention reports. These reports are available with a single click to save you time.

Setting user permissions is typically performed by an Owner/Administrator.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Reports > Advanced Reports > Create New Reports > Run Memorized Reports

See Setting User Permissions for more information.

To print or export a memorized report, users must have permission to the **Output of Reports**: Allow Exporting, Printing, and Saving of Reports.

Saving a memorized report

1. Generate a report using Advanced Reports.
2. Make changes to filters and the layout as needed, and then click **File** > **Save Memorized Report** from the main Reports menu bar.
3. Name your report, and then click **Save**.

   The reports are saved to your Agency Documents folder and will be available from the Memorized Reports list when you open Advanced Reports.

Memorized filter and layout selections are saved to your **Haw/Agency Documents** folder by default. Reports saved to any other location do not appear in the Report Generator dialog.

Running a memorized report

1. Click **Reports** > **Advanced Reports** from the main CMS menu bar.

   The **Report Generator** dialog opens.

   Report layouts, saved to the default location, are listed under the **Run a Memorized Report** section.
2. Click on the report title to open the report layout.

   Select **<Browse>** to navigate to any reports not saved in the default location.
3. Make filter and layout changes as needed.
4. Click **Finish** to run the report.

   See Working with Report Data for more options.

Accessing default memorized reports

The following memorized reports are included with a new installation of CMS. Click on a report link to see detailed steps to manually create the report or learn how to download the report, and learn how the report results can benefit your agency.

- Birthday Report
- Cancel Pending Report
- Cancelled Policies Report
- Claims Report
- Current Active Clients Report
- Data Clean-Up: Email Linked to Profile
- Data Clean-Up: Inactive Clients with Active Policies
- Data Clean-Up: Missing Agent Report
- Data Clean-Up: Missing CSRs and Producers
- Data Clean-Up: Link Phone to Profile
- Policies by Company Report (Book of Business)
- Production Report
- Renewal Report
- XDate Report

> If a report already exists in your memorized reports list, downloading the same memorized report overwrites any changes you might have made to the pre-existing report.

Related Topics

Custom Reports: Step by Step
Saved Reports
Advanced Customized Reports
Working with Report Data

Saved Reports

HawkSoft CMS enables you to save the results of an Advanced Report to conveniently view data at a future date.

> You can also save Agency Intelligence and Sales & Retention reports once you "drill-down" to the second level report data.

See Memorized Reports to save all the filter and layout selections of a report so future reports can be generated with the same criteria and layout.

In this topic:

Saving Report Data	Opening a Saved Report

This task is typically performed by an Owner/Administrator or Manager.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Reports > Advanced Reports > Create New Reports > Allow Exporting, Printing, and Saving of Reports
>
> See Setting User Permissions for more information.

Saving report data

1. With a report open, click **File** > **Save** from the Report toolbar.
2. Click **Save**.

   The report is saved to your **Haw/Agency Documents** folder by default.

See Agency Reports Overview for information on generating a new report.

Opening a saved report

1. Click **Reports** > Advanced Reports from the main CMS menu bar.

   Your saved reports are listed under the **Open a Saved Report** section.

2. Click on the report title to open the report results.

   > Select **<Browse>** to navigate to any reports not saved in the default location.

   See Working with Report Data for more options.

Related Topics

Advanced Customized Reports
Report Templates (Memorized)
Working with Report Data

Working with Report Data

Once you have your report data, you can sort, summarize, and filter the data to include or exclude specific information.

This task is typically performed by an Owner/Administrator or Manager.

> Required Permissions:
> No specific CMS user permissions are required to perform these tasks once the report is created.
>
> See Setting User Permissions for more information.

In this topic:

Reports Toolbar	Modifying Report View and Content
Export Report Data	Print Report Data

Reports Toolbar

Agency Intelligence	Click to access predefined Agency Intelligence Reports.
Sales & Retention	Click to access predefined Sales and Retention Reports.
Advanced	Click to create a new customized report using the Report Generator. See Advanced Customized Reports for more information.
Open	Opens the Agency Documents folder where your memorized and saved reports are located. Select a report and click **Open**. See Report Templates (Memorized) and Saved Reports for more information.
Save	Save the report to your Haw/Agency Documents folder. This option is available for Advanced Reports or once you drill-down in an Agency Intelligence or Sales & Retention report.
Print	Click to send the report to the selected printer. You must have permissions to **Reports: Allow Printing** for this option to be enabled. See Setting User Permissions.
Refresh	For Agency Intelligence and Sales & Retention reports, this button refreshes the data to reflect any recent changes in your agency's database since the report was opened.
Summary	Opens the **Create Summary** dialog to enable you to filter data further. This option is available for Advanced reports, or once you drill-down in an Agency Intelligence or Sales & Retention report.
Filters	Opens the Policy Type Filter dialog to enable you to rerun the report.

	This option is available for Advanced reports.
Layout	This button opens a dialog that enables you to add or remove columns displayed in your current report. Once changes are made to the columns, all existing data will update with the most current client/policy information. This option is available for Advanced reports, or once you drill-down in an Agency Intelligence or Sales & Retention report.
Tutorial	Click to open a brief reports tutorial.

Modifying the report view and content

Use the following options to obtain the specific information you need from the report.

To rearrange columns

Click and hold your mouse over any of the column headings, and then drag and drop column headings horizontally to rearrange the order.

To sort by a column

To sort the column data, click the column heading.

To reverse the order, click the column heading again.

To search for specific data in the report

The Filter fields at the top of the report columns enable you to select a data column and enter specific data to search for within the report results. For example, you can select **Last**and enter one or more key words to find all line items containing your entry in the report.

1. Select a Filter from the drop-down list.
2. Enter or select criteria in the next field.

3. Click **Apply** to see the results.
4. Optional: Click **Reset** to undo filters.

To create a new report from selected entries

You can select specific entries to create a new report.

1. Press and hold the **Ctrl** key and select specific entries.

   OR

   To select a range of line items, select the first item, and then press the **Shift** key to select the last item to be included in the section.
2. Right-click any of the selected entries and choose **New Report from Selected Entries**.

To summarize a report

The Summary function enables you to summarize data by selected criteria and then further manipulate the summarized data. A Report can be summarized multiple times, giving you the ability to drill-down to the necessary level of detail.

1. Click **Summary** on the report toolbar.

   The **Create Summary** dialog opens.
2. Select a field from the **Summarize** list.
3. Optional: You can add an additional type of premium to be included in the summary.

   For example, if your report layout includes **Current Premium**, you can choose to add **Annualized Premium** in your summarized report.

   Select a type of premium from the available **Premium Column** drop-down.

   The report includes the additional Premium type, as well as any premium fields that were included in the original report layout.

> The Premium column pulls Current Rate data from the General Policy Information. If the Current Rate on a policy is $0, the Quoted Premium will be used.
>
> This option is available for Advanced reports and policy reports in Agency Intelligence and Sales & Retention.

- **None** – Premium column does not appear on the Summary.
- **Current** – The total premium for all lines of business and policy coverages, fees, and taxes for the policy.
- **Quoted** – The amount entered in the Quoted Premium field on the General Policy Information screen on the policy.
- **Annualized Current** – The current premium is annualized based on the Term entered for the policy.
- **Annualized Quoted** – The quoted premium is annualized based on the Term entered for the policy.

4. Optional: Select the format for the **Group by** options.

> The **Group By** drop-down list is available only for date and status fields.
>
> This option is available only for Advanced reports.

5. Click **OK**.

   The summary lists the items by description.

   Example: When a report is summarized by 'Last', all names matching the same description are listed on the same line.

6. Highlight the line item(s) you are searching for, and then right-click to select **New Report**.

   Use the **Ctrl** key to select more than one line item.

Each time you generate a new report, a tab is created at the top of the report. You can click on the tabs to view the different reports.

7. To view a client file for a specific line item, double-click on it to open the client file.

To modify the report layout

Once you have run your report, you can modify the selected fields to be included in the report.

1. Click the **Layout** button, and then select **Add/Edit**.
2. Select the **Report Fields** to include in the report, and then click **OK**.
3. Optional: Click **Save Layout** to save the list of report fields as a new Report Layout.
   a. Enter a **Layout Name**.
   b. Click **OK**.

   The next time you create a report and want to use these same fields, click the **Report Layout** drop-down list and select the layout you just saved.
4. Click **Finish** to run the report.

Export report data

HawkSoft CMS enables you to export data from CMS reports. You can copy and paste data into an Excel spreadsheet, or select one of the Export options available when you click **File** > **Export** from the menu bar at the top of the CMS report.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Reports > Output of Advanced Reports/Activity Reports > Allow Printing, Saving, and Exporting of Report Data

See Setting User Permissions for more information.

Copy/Paste report data

You can copy and paste report data into a Microsoft Excel® document.

1. Select the line items to be copied.

   Press and hold the **Ctrl** key and select specific entries.

   OR

   To select a range of line items, select the first item, and then press the **Shift** key to select the last item to be included in the section.

2. Click **Edit** > **Copy** from the Report menu bar.

   The **Choose action to perform** dialog opens.

3. Select **Copy selected row(s)** or **Copy entire table**.

   a. *Optional:* If you selected the entire table, you can select **Include header row**.

4. Click **OK** to copy.
5. Open a blank Excel document.
6. Place your cursor in the first cell, and then click the **Paste** icon at the top of the Excel document.

Export menu options

You can easily export the entire report, all of the client files listed in the report, customer information to QuickBooks, or policies in an ACORD AL3 format or XML format. The following options are available from the Export menu.

Report

This option saves the entire report to a selected location.

1. Click **File** > **Export** >**Report**.

   The standard Windows® **Save As** dialog opens.

2. Navigate to the location where you want to save the report.
3. Save the report with one of the following file types:

- **Text Files (*.txt)** – Exports data as a text file.
- **Comma Delimited File (*csv)** – Exports data in a structure that can be opened with any spreadsheet software you have installed on your computer, such as Excel®.

Client File(s)

This option exports all client files in the report to a selected location.

1. Click **File** > **Export** > **Client File(s)**.

   The **Export Type** dialog opens.

2. Click **Browse** to locate and select the folder where you want to export the client files to.

   CMS will automatically create two sub-folders, **CLIENT** and **IMAGES**.

3. Optional: Check **Delete client files from current database?**

   Use this option if you are moving client files to another database.

   > This action cannot be reversed. HawkSoft, Inc. recommends creating a backup copy of your database before deleting client files.

4. Optional: Check **Include Attached Image Files**.

   If you do not check this option, client files will be exported without attachments.

5. Click **OK**.

Customers to QuickBooks

This option exports all customers on the report to QuickBooks®. The QuickBooks company file must be open for the export to complete.

Direct or Online integration

1. Click **File** > **Export** > **Customers to QuickBooks**.

   The **Export** confirmation dialog opens.

2. Click **Yes** to begin the export.

   When the export is complete, a confirmation dialog appears.

3. Click **OK**.

IIF integration

1. Click **File** > **Export** > **Customers to QuickBooks**.

   The **Export Items** dialog opens.

2. Click **Browse** to locate and select the folder you want to export the IIF file to.
3. Choose whether to export **All Items** listed on the report, or only **Selected Items** from the report.
4. Click **OK**.
5. Import the exported IIF file into QuickBooks from the location selected.

Customers exported from CMS will appear in the Customer list in QuickBooks.

Policies as ACORD AL3 or XML format

Before selecting this export option, you can select specific line items on the report to export. To include the entire report in the export, do not select any specific line items. *Available for Policy Reports only.*

1. Select **Policies as**, and then select **ACORD AL3** or **ACORD XML** to open the Export Policies dialog.
2. Click **Browse** to locate and select the folder where you want to export the AL3 files.
3. Select **Export Selected Row(s)** if you selected specific line items on

the report or select **Export All Rows** to export the entire report.

4. Click **OK**.

Print report data

HawkSoft CMS enables you to print your report using your local printer.

Formatting the report for print

Unlike saving the report electronically, the size and content of the report is constrained by paper size, and before the report can be printed, the report must be formatted for printing to prevent truncated or omitted data.

1. With the report open, select **File** > **Print Preview**, and then click **OK** on the **Enter Report Title** dialog.
2. Preview the report.

   If the report looks good, click **Close**, and then skip to Print the Report.

   OR

   If the report is cut off or missing data, you can format the report to fit your paper size, or change the page orientation.

   Format report options

   Remove unnecessary columns from the report through the **Layout** menu. See Modify the report layout for instructions on adding and removing columns from a report.

   Click and drag the edges of the column headers to resize column widths. The width of the columns in the report window determine the width of the columns on paper.

   Change page orientation

   Select **File** > **Print Setup** > **Landscape**, and then click **OK** to grant more column space.

Print the report

1. With the report open, click Print, and then enter a report title.
2. Click **OK**.

   The **Print** dialog opens.
3. Select your printer.

   > You can click Properties to change print options if needed. Available print properties will vary by printer and printer drivers.
4. Click **OK**.

Related Topics

Advanced Customized Reports
Agency Intelligence Reports
Batch Emails
Batch Mailing (Print)
Custom Reports: Step by Step
Data Replace Using the Report Generator
Sales and Retention Reports
Saved Reports
Report Templates (Memorized)

Suspense Report

HawkSoft CMS enables you to open a Suspense List as a report, based on selected filters. This method provides a little more flexibility and control than opening your Suspense List from the Start Page. You can filter the list to include Suspenses with a past, current, or future due date, and review Suspenses for all users or a specific user.

Suspense reports are commonly used to confirm that all users are current on their open Suspenses. In the event of an employee absence, CMS users can run this report to work the Suspense list of another user. For documentation and security purposes, this allows a user to work the Suspense list using their own login, rather than logging into CMS as another user.

To quickly view only your own Suspenses, you can easily access them from the Start Page.

In this topic:

If a user with open Suspenses is deleted from the CMS User List or marked as Inactive, their Suspenses continue to appear on Suspense Reports under their user initials.

If a user leaves the agency, HawkSoft, Inc. recommends the user be marked as inactive and any open suspenses reassigned to an active user. See Remove or Replace a User and Search and Replace.

Required Permissions:
In order to complete this task, user permissions must be set to include:

Reports > Suspense Reports (of other agents)

See Setting User Permissions for more information.

Running a Suspense Report for an individual user

1. Click **Reports** > **Suspense** from the main CMS menu bar.
2. Select **Suspense Filters** from the **Suspense** dialog and select the following filters as needed:

   Log Date – Finds all Suspenses that have a log date up to and including the selected date.

   Suspense Date – Finds all Suspenses that have a Suspense date up to and including the date selected.

   User – Select a user to include Suspenses only for that user.

You can quickly select a user by typing a user's name or initials into this drop-down. The drop-down will show only users whose name or initials match the string entered.

Only users with open Suspenses will appear in the drop-down list.

Company – Select a company to view Suspenses for policies written with a particular carrier.

State – Use this filter if you want to view Suspenses for clients in one particular state.

Category – You can limit your list to a specific Category, such as Renewals.

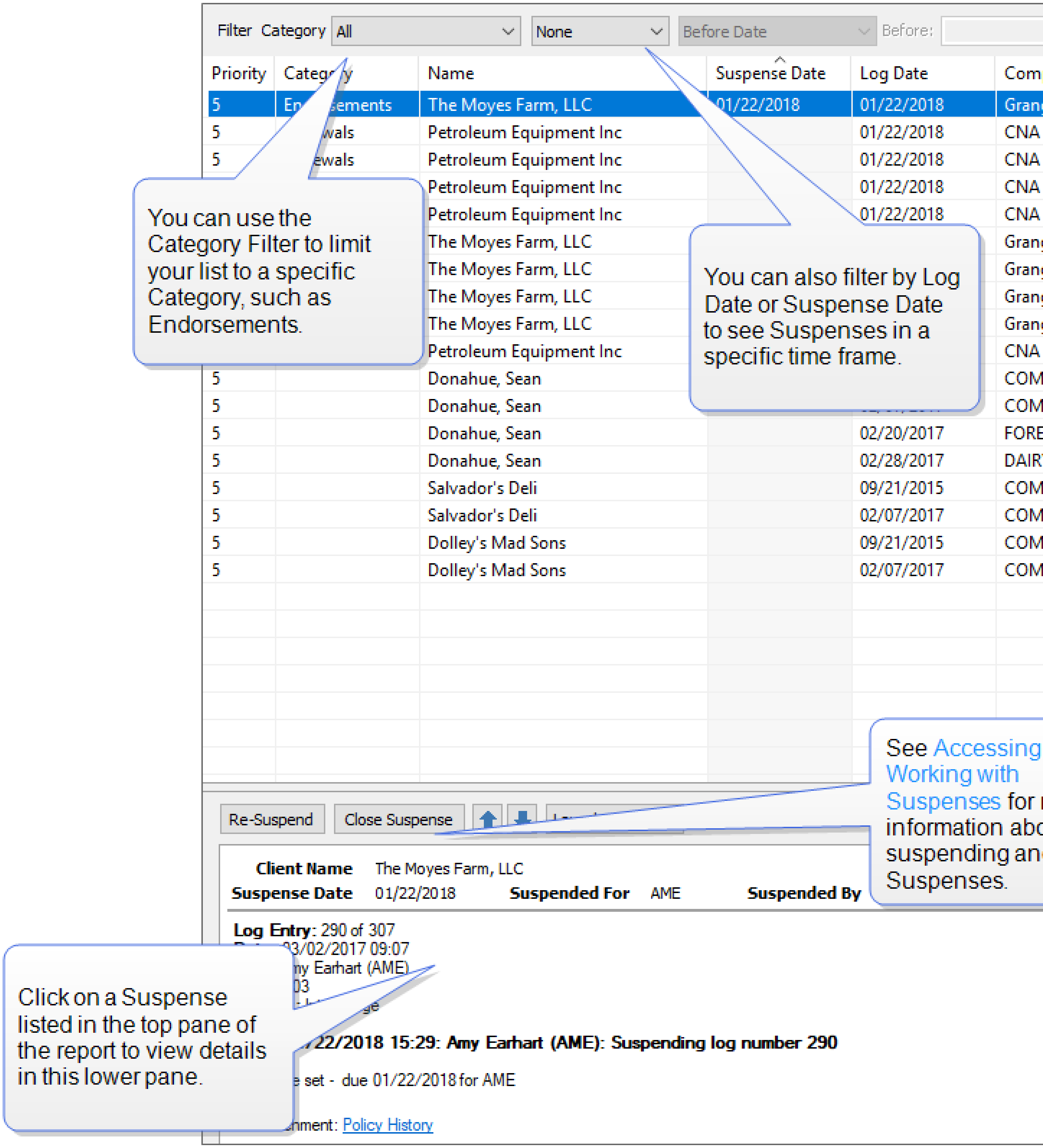
Maximum to View – Enter a maximum number of Suspenses to include in the report. CMS defaults this field to 1,000.

3. Click **OK**.

   The Suspense Report opens in a new tab displaying the Suspense List based on the selected user and filters.

Suspense Report data for a single user

The Suspense Report is divided into two viewing panes for an individual user.



Running a Suspense Overview Report for all users

1. Click **Reports** > **Suspense** from the main CMS menu bar.
2. Select **Suspense Overview Report**.

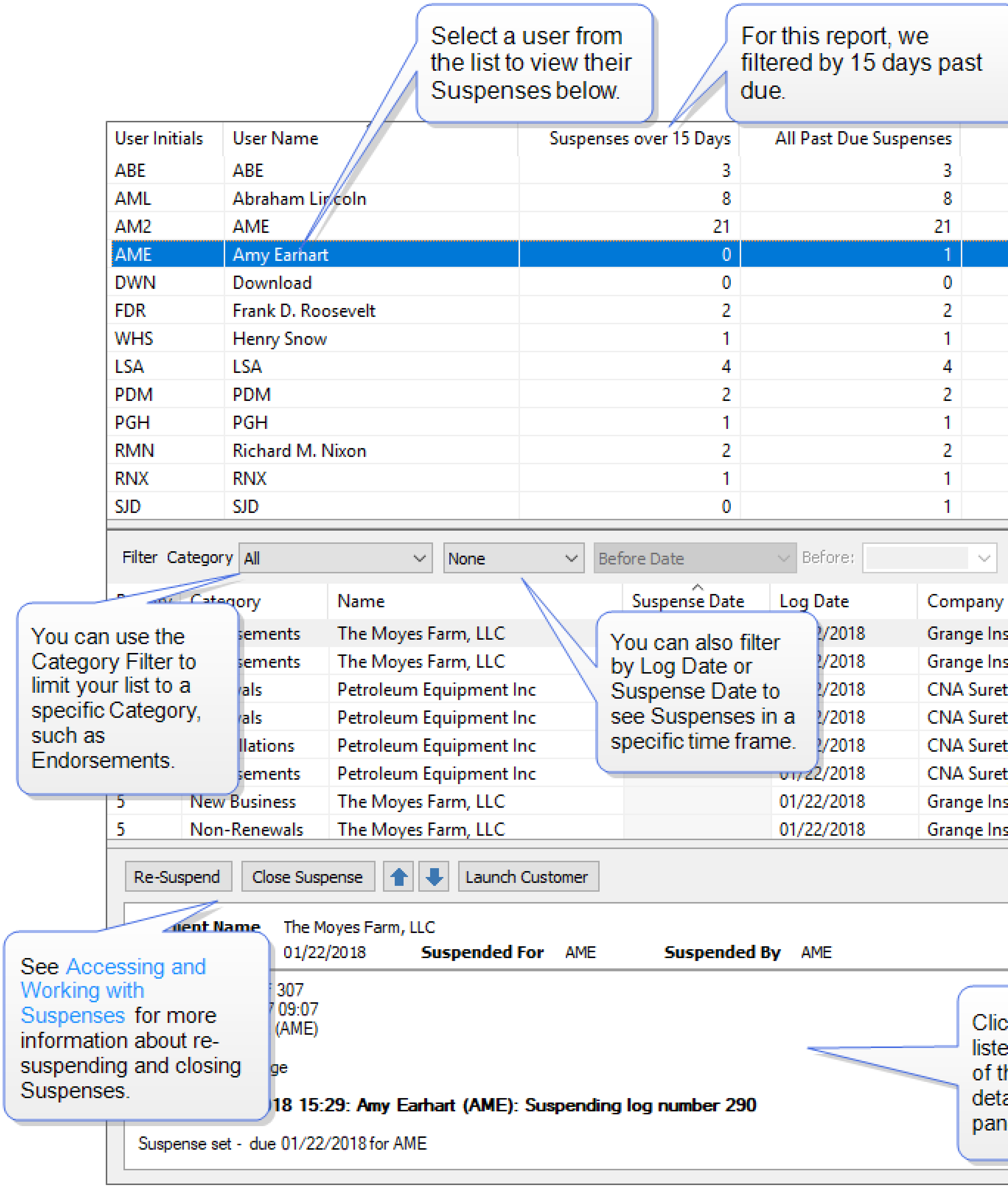
   Use the **Past Due by** field to include a list of Suspenses past due by a specific number of days.

   Example: Enter 15 to see the number of Suspenses that are at least 15 days overdue for each user.
3. Click **OK**.

   The Suspense Overview Report opens in a new tab displaying all Suspenses for each user in the top pane, and the current user's Suspenses in the center pane.

Suspense Report data

The Suspense Overview Report is divided into three main viewing panes.



Suspense Report columns

Column	DESCRIPTION
Priority	The priority level (1 – 5) set for the Suspense at the time it was created.
Category	The category assigned to the Suspense. The Category options can be modified in Customized Lists.
Name	The name of the insured or main contact on the Client file where the Suspense is located.
Suspense Date	Date the Suspense is/was due for follow-up. If this field is blank, the item is a Suspense with an open due date, meaning the item appears on the Suspense list immediately.
Log Date	Date the log entry was originally created, or the date the item was suspended for follow-up.
Company	The company name on the policy with the suspended log note.
Suspended By	CMS user who created the Suspense. DWN indicates the Suspense was created by settings in Download Configuration.
State	The State the policy with the suspended log note is written in.

To rearrange columns

1. Click and hold your mouse over any of the column headings.
2. Drag and drop column headings horizontally to rearrange the order.

To Sort by a column

To sort the column data, click the column heading.

Applying filters to the report

Use the Filter fields above the report columns to filter the Suspenses by Log Date or Suspense Date.

1. Optional: Click on the **Filter Category** drop-down list to view a list of Suspenses in a specific category.

2. Optional: Select a date range in the next fields to limit the Suspenses to a particular date range.
3. Optional: Click **Reset** to undo any filters.

   See Accessing and Working with Suspenses for more information on working with the Suspenses from the Suspense Report.

Printing the Suspense Report

To print the report, simply click the button on the CMS toolbar.

See Accessing and Working with Suspenses for additonal information.

Related Topics

Accessing and Working with Suspenses
Remove or Replace a User
Search and Replace
Suspending a Log Note

Activity Reports

The HawkSoft CMS Activity Report enables you to monitor the activities of users in CMS as well as data coming in from carrier downloads and vendors. The Activity Report displays user log entries, download logs, and the items processed through the Unmatched Documents.

Owners/Administrators, and Managers commonly use Activity Reports to track staff work volume or audit a user's log notes.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Reports > Activity Report
>
> See Setting User Permissions for more information.

Running an Activity Report

1. Click **Reports** > **Activity Report** from the main CMS menu bar.

   The **Activity Report** dialog opens.

2. Enter dates to report on activity within a specific date range.

   > Entering only a Start Date displays items from this date forward. Entering only an End Date displays everything up to and including this date. If dates are not specified, all matching items regardless of their date appear on the report.

3. Select a **User** name to limit the report to log entries created by that user only.

   > Select **<Include Inactive Users>** from the **User** drop-down to search for a non-active user.
   >
   > In addition, you can search for all log entries that were sent to client files by third-party applications by manually typing **<v>** into the **User** field.

   OR

   To see log entries for all users, leave the **User** field blank.

4. Click **Next**.

   The **Report Layout** dialog opens with the default **Activity Fields** layout selected.

5. Optional: Select a **Report Layout** from the drop-down list.

   > To run a report by Log Type, leave Activity Fields as the selected layout.

6. Optional: Modify **Report Fields**, as needed.

   a. Click **Add/Edit**, to change the Report Fields that appear in the report.

      The **Add Report Field** dialog opens.

   b. Select the **Report Fields** you want to appear in your report.

   c. Click **OK**.

7. Optional: Click **Save Layout** to save the list of report fields as a new Report Layout.

   a. Enter a **Layout Name**.

   b. Click **OK**.

The next time you create a report and want to use these same fields, click the **Report Layout** drop-down list and select the name of the layout you just saved.

8. Click **Finish** to run the report.

   The Activity Report displays all activities matching the specified criteria. To modify the report view and summarize the content, see Working with Report Data.

Related Topics

Custom Reports: Step by Step
Advanced Customized Reports
Suspense Report
Working with Activity Report Data

Download Report

The CMS Download Report includes important information about each of your processed downloads. This report enables you to review your processed downloads to confirm that they have been received from all carriers that you are expecting transactions from, and to verify that downloads are matched and processed as needed.

See Carrier Downloads Overview for more information about downloads.

In this topic:

Running a Download Report	Reviewing the Download Report
Working with the Download Report Data	The Download Report Layout

This task is typically performed by an Owner/Administrator, Manager, or CSR/Producer.

> Required Permissions:
> In order to complete this task, user permissions must be set to include:
>
> Reports > Download Report
>
> See Setting User Permissions for more information.

Running a Download Report

Once third-party downloads and the IVANS™ Transfer Manager software have been run, the Download Report is automatically generated and includes the last processed downloads.

> If your agency runs downloads as a scheduled task, you will need to run the Download Report manually.

In addition to the automatically generated Download Report, you can run the Download Report manually. The Download Report can be run from any workstation, so there is no need to print or email the report to another user.

1. Click **Reports** > **Download Report** from the main CMS menu bar.

   The **Download Report** task menu opens.

2. Select the type of Download Report you want to run.

   Last Processed

   Select this option to run a report of all downloads received the last time downloads were processed.

   The **CMS Download History Reports** window opens. This report includes data for the most recent downloads received.

   See Download Report and Working with the Download Report data below.

   New Advanced Report

   Select this option to run a report based on specific requirements.

   The **New Download Report** dialog opens.

   This dialog is divided into two sections: the top section is for choosing filters, and the bottom section displays a summary of your selected filters.

   1. Select your first filter from the **Where** drop-down list, and then select additional drop-downs as needed.

Example: If you want to run a report to include yesterday's downloads, you could select **Where** *Download Date+Is Yesterday*.

> You must select a value to go with your filter selection. For example, if you select the Carrier filter, but don't select at least one carrier in the available drop-down list, your search will ignore the Carrier filter.

2. Optional: Click the **New Filter** button to add another filter.

   The word **And** appears with another drop-down list.

3. Select an additional filter to combine with the first filter.

   Example: If you want to run a report to include yesterday's downloads for a specific carrier, you could select *Carrier* from the **And** drop-down list. *Is* is automatically selected from the second drop-down, and a list of carriers that you have previously received downloads from is available for you to select to include in your report.

   A **Summary** of your selected filters displays at the bottom of the dialog.

4. Click **OK** to see the results.

Reviewing the Download Report

It is important to review the Download Report to confirm that downloads are received from all carriers that you are expecting transactions from, and to verify that downloads are matched and processed as needed.

The Download Report indicates where downloads have been attached (*Customer ID/Policy Title*) and/or sent in CMS (*Unmatched Documents*, *Documents for Review*, and *Suspended*).

When possible, CMS automatically matches downloads to a policy in CMS, and then processes the download according to your Download Rules. Depending on the type of download, the matching criteria is slightly different.

Types of downloads received

Download Type	Description	Attaches/Updates Policy?	Unmatched Downloads
Policy Download	ACORD Policy downloads contain new policies or updated information for existing policies.	When matched to a policy # and LOB, these downloads can automatically: • Attach to a policy • Update policy information When matched to multiple policies with identical policy numbers and LOBs, the download matches to a policy according to the effective date on the download.	If either the line of business or policy number in the download does not match, the download goes to the Unmatched Documents Inbox.
Scanned Files and Other Down-	Memos, PDF files, Images, etc.		These downloads can be manually attached to a

Download Type	Description	Attaches/Updates Policy?	Unmatched Downloads
loads	Some carriers download dec pages in PDF format. These PDF files are processed as Other Download-sand do not automatically update policies.		policy.
EDocs and Messages	ACORD standard downloads that include a variety of messages and documents from carriers.	When matched to a policy # and LOB, these downloads can automatically: • Attach to a policy	When matched to more than one policy, the download will go directly to the Unmatched Documents Inbox
Claim	ACORD standard downloads that include claims details, such as claim	When matched to a policy # and LOB,	• If the claim

Download Type	Description	Attaches/Updates Policy?	Unmatched Downloads
	adjuster information and claim payment notifications. See Claims Downloads for more information.	these downloads can automatically: • Attach to a policy • Create a new Claim on a matching policy When also matched to a claim on a policy: • Update claim information on the policy	number doesn't match an existing claim on a matching policy, the claim download goes to the Unmatched Documents Inbox. • When matched to more than one policy, the download will go dir-

Download Type	Description	Attaches/Updates Policy?	Unmatched Downloads
			ectly to the Unmatched Documents Inbox
Commission	When a commission statement is included as part of the carrier downloads, CMS separates the commission statements from policy transactions and holds them for later processing. When these commission statements are received, a notification appears in your To Do list on the Start Page, and they are also listed on the Imported Commission Statements dialog, available for reconciling.	Downloaded commission statements can be imported into CMS. See Importing Commission Statements for more information.	

If a matching policy is not found, the download is sent to the Unmatched Documents Inbox to be manually matched and processed.

Once matched, depending on your configuration in Download Rules, downloads can be sent to Documents for Review, and/or Suspended for a selected user to review.

See Download Rules for more information.

Once unmatched downloads have been processed from the Unmatched Documents Inbox, you can re-run the report to display the initials of the user who matched the downloads, as well as the matched dates, initials of the user the download was suspended to, and initials of the user assigned to review.

Understanding the data/columns in the Download Report

The following data columns are available when reviewing your download report:

Column Heading	Description
Activity Note Type	This column applies only to eDoc downloads. This is the specific type of eDoc. For example, NonRenewal.
Agent Code	Indicates the Agent Code entered on the policy matched with the download.
Carrier	The carrier that wrote the policy.
Customer Name	Displays the named insured(s) listed on the carrier download. Downloads that are not processed successfully will appear as "**File Error** or **File Skipped** in the Customer Name column on the Download Report. See Download Troubleshooting for more information.
Download Type	The type of download is listed in this column. See Download Report
Effective Date	The date the downloaded transaction takes effect on the policy. Example: the date a policy will renew.

Column Heading	Description
Has Attachments?	A **Yes** indicates that the download contains attachments. This is most common in eDoc downloads.
Line of Business	The line of business of the downloaded file.
Policy #	The policy number as it appears on the carrier download. CMS uses the policy number to automatically match downloaded transactions to their respective policies in CMS.
Premium	The total premium associated with this downloaded transaction.
Remarks	The remarks that the company might write at the bottom of the eDoc download to clarify why the download was sent.
Sending Carrier	The company the download was received from. Generally the company who owns the writing carrier. Example: Progressive might be the sending carrier, although the policy is written by Homesite.
Trans Sequence #	The transaction sequence number that the carrier has assigned to this particular download. Although this is not commonly referenced, it can be useful in the event of troubleshooting a download issue with a carrier.
Transaction Date	The date the transaction was processed by the carrier.
Transaction Purpose	The purpose of the downloaded transaction. For example: New Business, Cancellation, or Endorsement. Some carriers may also download Direct Bill Commission

Column Heading	Description
	Detail or Reports.
Agent 1, 2, and 3	The initials of the Agent entered for this policy.
Application Type	The Application Type (Agriculture, Commercial, Personal) of the policy the download is matched to in CMS.
Client Office	Indicates the office assigned to the client file that the matched policy is attached to.
Customer ID	This indicates the CMS Client ID number of the file that was matched with the download.
Policy ID	The policy number as displayed on the CMS Client/Policy Bar.
Policy Office	Indicates the office assigned to the policy matched to the download.
Policy Title	Indicates, by LOB/policy title, the policy the download is matched to in CMS.
Rate Change	The percent (%) change of a downloaded policy premium compared to the previous download for that policy.
Uprate Rule Triggered?	A "Yes" indicates that the Uprate Alert is triggered for Renewal downloads. The Uprate Alert calculates the difference between the current premium and the renewal premium referenced in the download. If the difference is greater than the agency-determined threshold, a Suspense is created and/or a copy is sent to Documents for Review, depending on your configuration. See Download Rules for more information about the Uprate Alert setting.

Column Heading	Description
Documents for Review User	The initials of the user the download was sent to for review, as set in Download Rules.
Download Date	The date the download was actually received in CMS.
Matched By	When a document is processed from the Unmatched Documents Inbox, this column is populated with the CMS user initials of the person who processed the document.
Matched Date	The date the items were processed from the Unmatched Documents Inbox.
Policy Updated As	When a carrier download is automatically matched with its corresponding policy, the Policy Updated As column indicates the transaction purpose. For items that were sent to the Unmatched Documents Inbox and have since been processed, this column reflects that the policy was updated from the Unmatched Documents Inbox.
Processed Date	The date the download was processed by CMS. For Renewal transactions, agencies have the ability to configure CMS to update policies at the time the renewal download is received or delay processing of the renewal until the effective date of the term. See Download Configuration Settings for more information.
Sent To Unmatched Reason	Indicates why the download was sent to the Unmatched Documents Inbox. For example, *"Policy Number not found in CMS"*. When a download is able to process according to the Download Configuration Settings and is attached to the corresponding policy, this column is blank.

Column Heading	Description
Suspended to User	The initials of the user the download was suspended to, as set in Download Rules.

Working with the Download Report data

Once you have run your Download Report, you can use the features described below to work with your report data and modify your report to access specific information for review.

Columns

You can modify your columns to make it easier to review your data.

See Understanding the data/columns in the Download Report for a description of each column.

To select columns to display

CMS enables you to add columns, as well as remove columns, from your report.

1. Click the **Columns** button in the Download Report toolbar to open the **Select Download Report Columns** dialog.

   Available Columns that are not included in your report display on the left-hand side of the dialog.

   Columns included in your **Current Layout** are displayed on the right-hand side of the dialog.

2. Use the **Add** and **Remove** buttons to choose columns to display on your report.

To rearrange columns

Click and hold your mouse over any of the column headings, and then drag and drop column headings horizontally to rearrange the order.

To sort by a column

Click the column heading to sort the data alphabetically or numerically.

To reverse the order, click the column heading again.

To save column layout

Once you have made changes to your column layout, you can save the layout to be used for future reports.

1. Click **File** > **Save Column Layout** from the Download Report menu bar.

   The **Save Report Layout** dialog opens with a list of previously saved layouts.

2. Enter a description in the **Save Layout As** field, and then click **Save**.

To access and modify saved column layouts

1. With your report open, click the **Columns** button.

   The **Select Download Report Columns** dialog opens.

2. Click **Load Column Layout**.

   The **Load Download Report Layout** dialog opens with the following options.

   - **Select a saved layout**:

     a. Click **OK**.

        The **Select Download Report Columns** dialog opens.

     b. You can **Add** or **Remove** columns from the saved layout if needed.

    c. Click **OK** to apply the selected layout to the open report.
    d. If changes were made to the layout, you can click **File** > **Save**, or **Save As** to save the modified layout.
- **Remove**: Select a column layout to be removed, and then click **Delete**.
- **Rename**: To modify the name of a saved layout, select the layout and then click **Rename**.
- **Select default layout**: To select a saved layout to be used for future reports, select the **Set Default** button.

Search

You can use the Filter bar at the top of the report to search for specific information in your report. For example, you might want to search for a specific policy number or agency code in your report.

1. Select a data type from the **Filter** drop-down, and then enter the text to search for in the available search field.
2. Click **Apply** to see the results.
3. Optional: Click **Reset** to refresh your report.

Summarize

You can summarize your report by any of the columns displayed in your report.

1. Click the **Summary** button on the Report toolbar, or use the **Right-click** menu and select **Summary**.

> Optional: Before clicking Summary, you can use the Ctrl key to select specific line items to include in the summary.

The **Create Summary** dialog opens.

The data columns displayed on your report are available to summarize by.

2. Select an item from the **Summarize by** list, and then click **OK**.

See Download data columns for a description of column information.

Filters

Two Filter dialogs are available from the Download Report.

New Download Report Filters

This dialog enables you to select report filters to run a new report based on specific criteria. Click the **New** button on the Download Report toolbar to run a new report.

To select new filters

The New Download Report dialog is divided into two sections: the top section is for choosing filters, and the bottom section displays a summary of your selected filters.

1. Select your first filter from the **Where** drop-down list, and then select additional drop-downs as needed.

   Example: If you want to run a report to include yesterday's downloads, you could select **Where** *Download Date+Is Yesterday*.

> You must select a value to go with your filter selection. For example, if you select the Carrier filter, but don't select at least one carrier in the available drop-down list, your search will ignore the Carrier filter.

2. Optional: Click the **New Filter** button to add another filter.

   The word **And** appears with another drop-down list.

3. Select an additional filter to combine with the first filter.

   Example: If you want to run a report to include yesterday's downloads for a specific carrier, you could select *Carrier* from the **And** drop-down list. *Is* is automatically selected from the second drop-down, and a list of carriers that you have previously received downloads from is available for you to select to include in your report.

   A **Summary** of your selected filters displays at the bottom of the dialog.

4. Click **OK** to see the results.

Modify Download Report Filters

The Modify Download Report Filters dialog enables you to add or remove filters to your open report. To access this dialog, select the **Filters** button on the Download Report toolbar.

For example, if you have your report of recently processed downloads open, you can use the Filters dialog to add a **Transaction Purpose** filter to view only a specific set of transaction purposes (Renewals, Cancellations, etc).

To add or remove filters

The Modify Download Report Filters dialog is divided into two sections: the top section is for choosing filters, and the bottom section displays a summary of your selected filters.

1. You can use the available drop-downs to modify a filter, or click the X to the right of the filter, to remove a filter.
2. Click the **New Filter** button to add a filter to your query.

   The word **And** appears with another drop-down list.
3. Optional: Select an additional filter to combine with the first filter(s).

   Example: If you want to run a report to include downloads for a specific carrier, you could select *Carrier* from the **And** drop-down list. *Is* is automatically selected from the second drop-down, and a list of your carriers that download is available for you to select the carrier to include in your report.

   A **Summary** of your selected filters displays at the bottom of the dialog.
4. Click **OK** to see the results.

Batch Email

You can send a batch email to the clients matched with downloads in the report.

> HawkSoft Inc. recommends batch emailing from a report run with Advanced Reports to make sure you are including your processed non-downloaded policy changes as well. For example, if you batch email all of your pending cancellations from the Download Report, you are not including your non-downloaded pending cancellations.

1. Use the **Ctrl** key to select specific downloads.
2. Use the **File** menu or the **Right-click** menu, and then select **Send Email**.
3. Make selections on the **Select Email Template** dialog as needed.

   See Batch Emails for detailed instructions.
4. Click **Ok**.

   The **Email From Report** dialog opens. By default the email is sent to the client's Primary Email address.
5. Modify the email as needed, and then click **Send**.

See Batch Emails for detailed instructions.

Batch Log/Suspense

You can create a batch log for specific downloads in your report, and then Suspend those logs to a specific user to take action on those downloads.

For example, select your Renewal downloads, and then create a batch log and Suspend the logs to a specific user to follow up with each client for renewal.

1. Use the **Ctrl** key to select specific downloads.
2. Use the **File** menu or the **Right-click** menu, and then select **Create Batch Log**.
3. Complete the batch log, and then select a specific user to Suspend the selected items to.

See Creating a Batch Log Note for more information.

Save or open saved report

To save a report

Click **File** > **Save** or **Save As** from the main menu bar to open File Explorer and save the report to your Agency Documents folder.

To open a saved report

Click **File** > **Open** to open your Agency Documents folder and select a previously saved report.

Export Report

This option saves the entire report as a .txt or .csv file to give you more flexibility when processing downloads.

1. Click **File** > **Export Report**.

   The standard Windows® **Save As** dialog opens.
2. Navigate to the location where you want to save the report.
3. Save the report with one of the following file types:
   - **Text Files (*.txt)** – Exports data as a text file.
   - **Comma Delimited File (*csv)** – Exports data in a structure that can be opened with any spreadsheet software you have installed on your computer, such as Excel®.

The Download Report Layout

You can use the menu bar, toolbar, and right-click menu to review and modify your report. The following tables describe each of the available options. Detailed steps for these features are described in the above sections.

Many of the features described below are available from the menu bar, toolbar, and right-click menu for your convenience.

Download Report menu bar

The following menus are available at the top of the report. Click on each menu to see the available options. For example, click **File** to see the File menu options.

File Menu	
New	Opens the New Download Report Filters dialog to run a new report based on specific criteria.
Last Processed	Runs a report of all downloads received the last time downloads were processed.
Open	File Explorer opens to enable you to select a previously saved report from your Agency Documents folder.
Close	Click to close the open report tab.
Save/Save As	Save the open report to your Agency Documents folder.
Save Column Layout	Opens the Save Report Layout dialog to enable you to enter a description of your saved layout.
Export Report	Opens the Save As dialog so you can save the report as a .txt or .csv file.
Send Email	Opens the Select Email Template to enable you to

	select an Email template to send to clients matched to the selected downloads.
Create Batch Log	Create a batch log note for client files matched to selected downloads. You can use this feature to set suspenses to specific users.
Send to Unmatched Documents Inbox	The selected download is sent to the Unmatched Documents Inbox. Unmatched downloads are automatically sent to the Inbox, however, this option is useful if a download is accidentally attached to the wrong policy or a download is unintentionally deleted from a policy. You can send the download to the Inbox to attach it to the correct policy.
Print Report	Print the entire Report.
Print Preview	Select to preview the printed report before printing.
Print Setup	Opens the Print Setup dialog to enable you to select a printer and paper size/orientation.
Print Options	Select layout options for your printed report.
Logout	Locks CMS until you log back in.
Exit	Close Report Generator.
Edit Menu	
Copy	Copy selected downloads. You can then paste the selected report items into an Excel spreadsheet.
Select All	Selects all items in your open report. (**Ctrl+A**)
Create Summary	Opens the Create Summary dialog to enable you to summarize the selected items by specific criteria, such as *Transaction Type* or *Suspended to User*,

	giving you the ability to review important information.
Create New Report from Selected Entries	Creates a new report in a new tab containing only the selected entries. Use the Ctrl key to select specific entries to include in the new report.
View Menu	
Client	Opens the client/policy matched with the selected download.
Download Image	Opens the selected download in the CMS Viewer.
Filters	Opens the Modify Download Report Filters dialog to enable you to modify or add filters for the current report.
Columns	Opens the Select Columns dialog to enable you to select the columns to be included in your report.
Toolbar, Toolbar Captions, Status Bar	Select/deselect any of these options to determine your view of the Toolbar and Window Status Bar (located at the bottom of the report).
Window Menu	
New Window, Cascade, Tile, Arrange Icons	Select any of these common Windows settings to change your window view for the selected report.
Help Menu	
HawkSoft CMS Help	Click to access the Download Reports article in the Help System.
Send to Support	Click to send an email to HawkSoft Support.
About Report Generator	Click to view System Info and License Info.

Download Report toolbar

New	Opens the New Download Report Filters dialog to run a new report based on specific criteria.
Open	File Explorer opens to enable you to select a previously saved report from your Agency Documents folder.
Save	Save the open report to your Agency Documents folder.
Print	Prints the report currently being viewed. It is not necessary to print the report each day. CMS gives you the ability to run download reports for any specified time frame.
Summary	Opens the Create Summary dialog to enable you to summarize the selected items by specific criteria, such as *Transaction Type* or *Suspended to User*, giving you the ability to review important information.
Filters	Opens the Modify Download Report Filters dialog to enable you to modify or add filters for the current report.
Columns	Opens the Select Columns dialog to enable you to select the columns to be included in your report.
Last	Runs a report of all downloads received the last time downloads were processed.
Help	Opens the Download Reports article in the Help System.

Right-click menu

The right-click menu is available when selecting one or more items in the report.

To select more than one attachment, hold down the **CTRL** key and select multiple attachments. Once the attachments are chosen, right-click on one of the highlighted selections to access the menu.

View Client	Opens the client/policy matched with the selected download.
View Download Image	Opens the selected download in the CMS Viewer.
Send to Unmatched Documents Inbox	The selected download is sent to the Unmatched Documents Inbox. Unmatched downloads are automatically sent to the Inbox, however, this option is useful if a download is accidentally attached to the wrong policy or a download is unintentionally deleted from a policy. You can send the download to the Inbox to attach it to the correct policy.
Summary	Opens the Create Summary dialog to enable you to summarizes the selected items by specific criteria, such as *Transaction Type* or *Suspended to User*, giving you the ability to review important information.
New Report from Selected Entries	Create a new report containing only selected downloads. Use the Ctrl key to select specific entries to include in the new report.
Select All	Selects all items in your report. Once all items are selected, you can use the right-click menu to select another action, such as Send Email.
Send Email	Opens the Select Email Template to enable you to select an Email template to send to clients matched

	to the selected downloads. Use the Ctrl key to select multiple entries to include in a Batch Email.
Create Batch Log	Create a batch log note for client files matched to selected downloads. You can use this feature to set Suspenses to specific users.
Print Form Letters	Opens the Print Form Letters dialog to enable you to select a Form Letter template or Label template and print the letter(s)/label(s) for the selected matched download(s).
Reset Column Widths	Sets the column widths back to their original settings if they have been changed.
Filters	Opens the Modify Download Report Filters dialog to enable you to modify or add filters for the current report.
Columns	Opens the Select Columns dialog to enable you to select the columns to be included in your report.

Related Topics

Carrier Downloads Overview
Download Configuration Settings
Download Troubleshooting
IVANS Transfer Manager
Processing Unmatched Documents
Process Carrier Downloads

